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FROM Lucy J. Lehman (for Gregory J. Kirsch, Esq.)
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Please review and contact me at 678-420-9366 (DD) to discuss whether June 1 or June 2 works best for a personal interview.

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Meeting with Patent Examiners Hosain T. Alam/Thu Ha Nguyen
U.S. Patent and Trademark Office
Wednesday, June 1 or 2, 2004

U.S. Patent Application No. 09/427,787
N&R Reference: 22022.0004US

AGENDA

DRAFT
**FOR GENERAL DISCUSSION
PURPOSES ONLY**

- I. Introduction**
- II. Brief background of Yodlee, Inc. (patent application assignee)**
- III. The present patent application (09/427,787)**
 - a. The current set of patent claims
 - 1. "aggregating content associated with the end user by the host computer from one more more information providers"
 - a. meaning of "aggregating content" as defined in the specification
 - 2. Remaining limitations of the claims
 - b. Comparison to the prior art
 - Bakshi, U.S. Patent No. 6,345,300
 - 1. Stores *user-controlled parameters* as cookies
 - 2. This is not "content" as defined in the specification of the present patent application
 - 3. Discussion of other distinguishing features
 - c. Discussion of strategy for moving the patent application forward
- IV. Any other questions/comments from the Examiners**
- V. Conclusion**